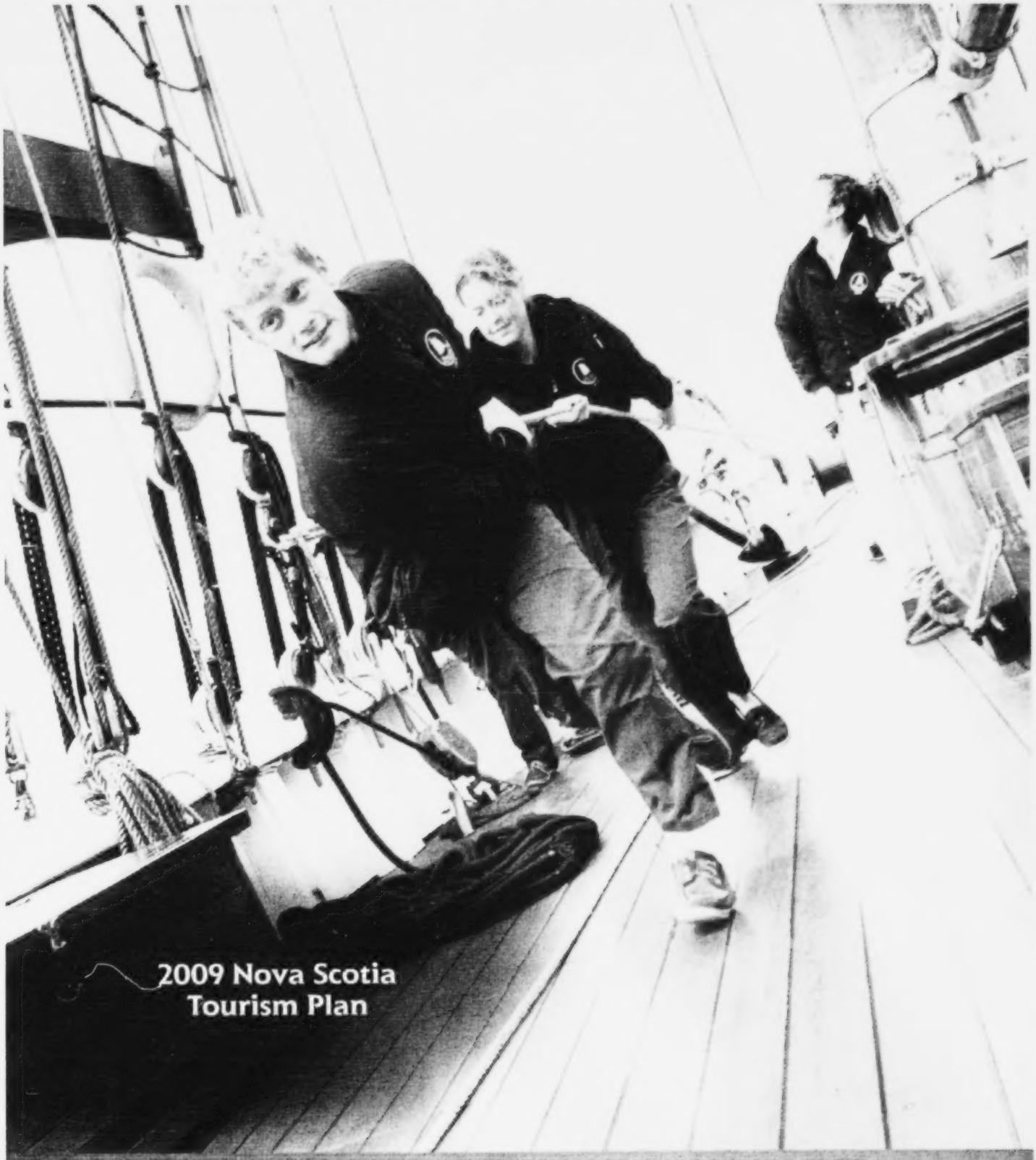


2009 Nova Scotia Tourism Plan

NovaScotia.com

NOVA SCOTIA
Tourism, Culture and Heritage

Minister's Message

Dear Tourism Partners,

I am proud of the men and women in our Nova Scotia tourism industry who worked hard to keep visitors coming in 2008. Although the volatility of the world economy has affected the global tourism industry, we fared reasonably well in this tough environment.

We could not have predicted these economic challenges but we must – and we will – face them together in 2009 and beyond. Tourism has proven to be a resilient industry in the face of economic shifts in the past, and I have confidence we will come out on top once again.

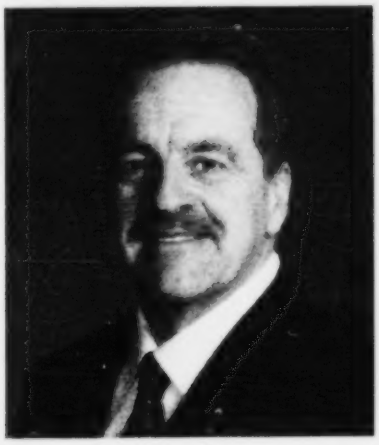
To get there, we must continue to be competitive. We must continue to stay on top of the trends and cater to today's travellers. And we must continue to work in partnership to maintain the strength of our industry in these challenging times.

That is the focus of our plans for 2009 to support our multi-year strategy, *New Realities, New Directions*. I am pleased to share these plans with you and encourage you to take advantage of the many partnership opportunities.

Together, we will continue to work strategically to strengthen the tourism industry in Nova Scotia.

Sincerely,

Bill Dooks
Minister of Tourism, Culture and Heritage



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Executive Summary

The global tourism industry faced significant challenges in 2008. A combination of factors, from high fuel prices to economic instability, resulted in lower consumer confidence and spending, altered travel behaviour and changes in the industry such as the loss of airlines resulting in reduced air access.

Nova Scotia was not immune to these pressures. Overall visitation was down slightly from previous years. The decline in United States visitation continued, while traditionally strong markets, like Ontario, showed some decrease. On the positive side, growth in the European and Western Canadian markets continued, cruise passenger visits increased and room nights sold grew modestly.

Our tourism strategy, *New Realities, New Directions*, introduced in 2006, remains relevant. The strategy has three pillars – courtship, gateway and core experiences – and allows the flexibility needed to adapt to changing market conditions. Our new brand positioning is rooted in our maritime culture, both modern and traditional, and appeals to today's "cultural explorer" who wants to experience the way of life in the places he or she visits.

In 2009, we will build upon the fundamental strengths of our brand and respond to change by pursuing opportunities in growth markets and using new tactics.

We'll strengthen our efforts in the Maritime region to maximize visits from our largest market and to respond to the trend of people travelling closer to home.

We will reallocate some investments to fuel an increase of visitors from our main European market, the United Kingdom, and from Western Canada, while maintaining a presence in the northeastern United States. And we will continue activities in other core markets like Ontario and Quebec.

Our new brand advertising campaign will lure potential visitors to the beauty and culture of Nova Scotia through the warmth and friendliness of our people. We will use the latest in social media to connect more people with our unique mix of products and experiences. This will be integrated with a more comprehensive events and editorial program, as well as travel trade activity and our conventional advertising mix of TV, print, direct mail and online.

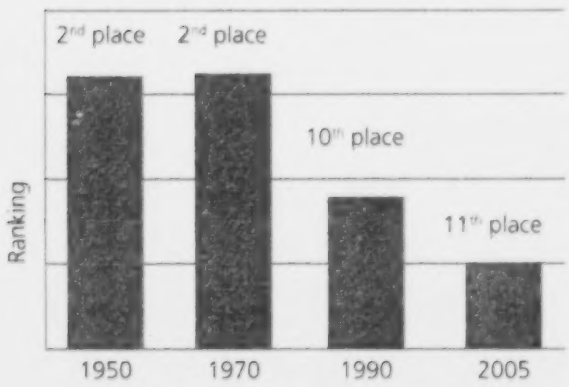
Provincial visitor information centres will be refreshed to reflect our new brand and travel regions, and to better meet visitor needs. In addition, new communications tools will be introduced to help to better inform and engage industry. Finally, we'll continue to work toward building a sustainable and competitive tourism industry by helping to develop unique, authentic experiences that meet the needs of a changing marketplace.

Our Changing Industry

Globally, tourism continues to be a growth industry. Despite long-term growth potential, the industry worldwide is faced with unprecedented challenges brought on by the recent economic downturn and a highly competitive environment.

The market continues to become more fragmented with a wider choice of destinations and an increase in niche products and experiences. Many emerging destinations are in Asia, Eastern Europe and South America – areas that tourists had not previously considered. Affordable air travel and the increasing use of the Internet mean these destinations can readily market themselves, and travellers can easily research and book their trips. In the midst of this new competition, Canada – and indeed, North America – has been losing share in the global travel marketplace.

Canada's Position as a Travel Destination



The past year has also seen volatility in fuel prices, posing challenges to all modes of transportation and contributing to the collapse of more than 30 airlines worldwide. The economic downturn and its impact on consumer confidence and spending are affecting travel behaviour, and many international destinations face challenges.

One trend that emerged is increased travel close to home. The "staycation" phenomenon was a big news item of 2008.

The United Nations World Tourism Organization predicts that the situation will worsen before it improves. Global tourism is predicted to grow by less than two percent in 2009.

The needs and behaviours of travellers are also changing. Trip planning and booking have moved online to resources such as TripAdvisor, Expedia, destination marketing sites and a wide range of other sources. Travellers are increasingly looking for the advice of other travellers, whether through TripAdvisor or through blogs and posted reviews on other sites. This interaction between individuals through online social networks like Facebook and YouTube is called social media and is the next evolution of tourism marketing.

Beyond their planning behaviours, today's travellers are looking for richer, more authentic experiences, a change driven by increasing affluence and age. The traditional two-week family road trip is being replaced by resort-based vacations or immersion into the culture of places around the world. Travellers also have the ability to choose destinations and experiences that cater to their individual interests, resulting in greater fragmentation of destinations and types of vacations. This has lead to the growth of specialized niche markets, such as food and wine lovers or motorcycle enthusiasts, and trends, such as "affinity" tours among groups of like-minded travellers, learning-based vacations and women-only travel.

The Impact on Nova Scotia

Looking ahead, Nova Scotia must face the realities of the quickly changing global environment.

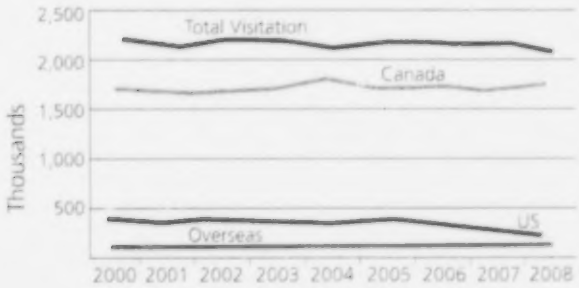
Travel from the United States to Canada reached an all-time low in 2008. The many reasons for the decline include volatile fuel prices, a fluctuating dollar and passport issues, but equally to blame is the fact that Americans don't see Canada as exotic or different. Many are choosing to travel to places like Europe, Mexico, the Caribbean, South and Central America and Japan. The Conference Board of Canada predicts that the decline of U.S. visitors will continue for the next two years, given the economic uncertainty. The Canadian Tourism Commission (CTC) has responded with a refreshed Keep Exploring brand and is striving for a more sophisticated appeal.

Today, Nova Scotia draws about nine percent of our overnight visitors from the U.S., compared to 15 percent in 2000. This decrease in American visitors has been largely offset by increases in the domestic and overseas markets, keeping Nova Scotia's tourism numbers relatively stable at just over two million visitors annually.

However, the steady decline in U.S. visitors, coupled with unstable economic conditions, made for a challenging year in our tourism industry. While we maintained visitation from most markets in 2008, the overall number of visitors to the province is expected to decrease by three percent compared to 2007.

Room nights sold, however, are projected to increase by two percent over 2007. This varies from region to region – from a five percent increase in Halifax-Dartmouth to a five percent decrease in Cape Breton. The combination of fewer visitors and more room nights sold may be the result of longer stays and more Nova Scotians travelling or vacationing within the province.

Visitation by Major Market



Several bright spots in 2008 include a five percent increase in travellers from Europe due in part to our ongoing work with travel trade and travel media in that market, as well as the International Ice Hockey Federation (IIHF) World Championships held in Halifax in May 2008. European visitors tend to be "high yield," spending on average more than visitors from elsewhere. We also saw an eight percent increase in travellers from Western Canada. And the number of cruise ship visitors – while not included in overall visitor counts because they do not stay overnight – increased by 38 percent to the province overall.

One of Nova Scotia's challenges has been accessibility from its major markets. A growing preference for air travel means increased importance of direct air links to Nova Scotia and when partners, like Zoom Airlines, are lost, the fallout can be directly felt by our industry. Fuel price volatility and economic instability have created pressure for air carriers and other transportation partners such as Bay Ferries and motorcoach operators. These factors have also presented challenges for visitors who travel to Nova Scotia by car.

Bay Ferries Ltd.: The Cat

Other challenges include a peak season, a need to refresh our tourism products and experiences, increased marketing spending by other destinations, and a perception that Canada and Nova Scotia are expensive relative to alternatives.

Despite the challenges, Nova Scotia has many strengths upon which to build a sustainable tourism industry: a beautiful seacoast and largely undeveloped natural environment, a distinct and appealing maritime culture, friendly people and world-renowned hospitality. We also have a rich culture and heritage, hundreds of unique festivals and events, and internationally recognized destinations like Cape Breton and Bay of Fundy, as well as our two UNESCO World Heritage sites, Lunenburg and Joggins.

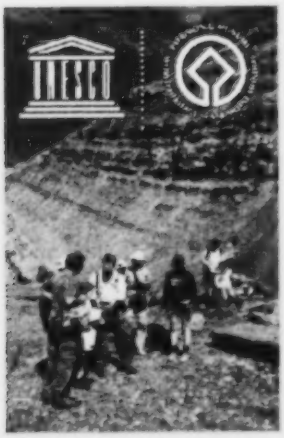
Our future success lies in effectively marketing our province, and just as importantly, in fostering the entrepreneurial spirit needed to respond to trends with innovative, market-driven experiences. Tourism operators throughout Nova Scotia are stepping up to the challenge with unique world-class offerings; for example, "geo-experiences" at Kejimkujik and Annapolis Royal, tidal bore rafting, Sugar Moon Farm chef nights, the Not Since Moses 10k run (on the flats of the Bay of Fundy), outdoor theatre and the Celtic Music Interpretive Centre.

Tidal Bore Rafting

2008 in Review

Industry success

Nova Scotia had much to celebrate in 2008, despite a difficult year. The IIHF World Hockey Championships held in Halifax brought many Europeans to the province in May and provided a great start to the peak season. The Joggins Fossil Cliffs received the designation of UNESCO World Heritage Site. In addition, Nova Scotia experiences received top ranking in a number of international lists: Cape Breton was selected by Travel + Leisure magazine as the best island to visit in the continental United States and Canada; Tall Ships was named the top event in Canada by the American Bus Association for 2009; and Lobsterpalooza and the Royal Nova Scotia International Tattoo received recognition as top events for 2009.



Joggins Fossil Cliffs recognized as a UNESCO World Heritage Site

Cape Breton Island named #1 Island to visit in the continental U.S. and Canada

A new look

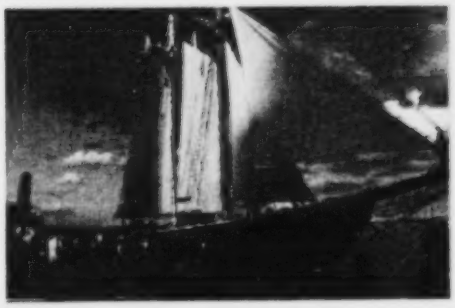
With the help of consumer research and industry insights, we introduced a new brand positioning in 2008 to guide our long-term initiatives. We also introduced a new tourism regions map to reflect the visitor experience and to help regions market their unique assets and experiences. The brand and travel regions were integrated into new materials, including refreshed Doers' and Dreamers' and Festivals & Events guides, and a new Driving Guide. The brand also guided a new national and regional advertising campaign, which included TV, print, radio, direct mail, online and events.

2008 Magazine Ad Skyline trail

2008 National and Regional TV

Bringing the Nova Scotia experience to market

In June 2008, we teamed up with 35 industry partners to present our most successful event ever held in Toronto. More than 40,000 people visited the Toronto Nautical Festival, which was sponsored by Nova Scotia. In addition to visiting the iconic Bluenose II, consumers were able to sample other aspects of our culture, such as entertainment by our four founding cultures and Nova Scotia cuisine. A smaller event coincided with the visit of Bluenose II to Quebec City as part of its 400th anniversary celebrations. We also sponsored one of the 10 yachts in the Clipper Round the World race, garnering extensive international media coverage.



2008 Toronto Nautical Festival

Cruise market

We also worked hard on increasing Nova Scotia's presence in the cruising world. As a result of efforts with the Atlantic Canada Cruise Association, and our port and other industry partners, we welcomed more than 300,000 cruise ship passengers in 2008. While active in raising awareness of the ports of Halifax and Sydney, we also tried to steer more cruise ships to smaller ports like Pictou, Baddeck and Lunenburg.

Cruise ships in Halifax

In addition to attending trade shows, holding special events and implementing marketing partnerships targeting the cruise market, we hosted eight familiarization (or Fam) tours that welcomed more than 300 cruise line executives and top cruise sales agents to the province. We're also working with partners to develop homeporting in Nova Scotia. Because these ships begin and end cruises here, their passengers typically stay longer, see more of our province and, of course, spend more while here.

Media coverage

In February, Nova Scotia hosted the Travel Media Association of Canada (TMAC), which drew 185 travel media from throughout the country. We also hosted fam tours for almost 200 travel trade professionals and media. The result was approximately $9.4 million in earned print media coverage for Nova Scotia, with high-profile coverage in publications such as Conde Nast Traveler, Canadian Geographic, the Sunday Mail (London), St. Petersburg Times and Endless Vacations magazine. (The value of 2008 media coverage was based on advertising value. The past industry standard was to use a multiplier, resulting in a higher number.)

Novascotia.com

We continued to evolve novascotia.com, improving customers' ability to book online and enabling operators to list and update their own information on accommodations, attractions, music, theatre and arts and crafts.

Unique visitors, or those who haven't visited the site in a specific time period, decreased by 11 percent. However, there are indications that the quality of those visits has improved. Through search engine marketing techniques, we are working to focus more narrowly on people with a propensity to travel to Nova Scotia. Our Travel Intentions Survey shows that 80 percent of people come to novascotia.com for trip planning purposes. The time they spend on the site has increased by eight percent. The average visitor is now spending over five minutes on the site and visiting over seven pages, a nine percent increase over 2007.

In 2008, we entered the world of social media with a user-generated content campaign – My Favourite Places in Nova Scotia and Leaf Watch, engaging visitors with relevant and personal content. The addition of share functionality, social bookmarking and RSS helped to push branded content to the online world.

"My favourite place in Nova Scotia is Cape Breton Island. Honestly, three months ago I had never heard of this heavenly place. Each day was another "WOW" that took my breath away. I cried as I crossed the Causeway to head home, knowing that I had to return."

Building experiences

In 2008, we continued to develop core experiences by supporting more than 40 projects through our Tourism Development Initiative, including the Acadian Shores Interpretive Trail and a Total Market Readiness project for the Yarmouth and Acadian shores. Also enhancing Nova Scotia's offering of unique experiences were the opening of the Joggins Fossil Cliffs Interpretive Centre and its UNESCO World Heritage designation, the addition of two new Economusees – Bay Hammock and Harbour Quilt Company – and the opening of an accessible trail and interpretive centre at the Eatonville Three Sisters site at Cape Chignecto Provincial Park.

Cape Chignecto Provincial Park

We produced new instructional guides for developing community kiosks and outdoor interpretive signage and hosted sessions with Roger Brooks of Destination Development Inc. on the Cabot Trail and Bluenose Coast experiences.

Working with partners

Nova Scotia's marketing efforts are enhanced and strengthened through a variety of partnerships, ensuring that we make the most of our limited marketing resources.

In 2008, we continued to provide cooperative marketing support through our Tourism Marketing Opportunities Program. Over 125 festivals, including the Hike The Highlands Festival and the Lunenburg Folk Harbour Festival, were provided with marketing support through the Regional Tourism Industry Associations (RTIAs). The Tourism Marketing Assistance Program also supported over 15 projects including Lobsterpalooza and the Bear River marketing campaign.

We continued to work with the Tourism Industry Association of Nova Scotia (TIANS) on important issues such as the Tourist Accommodations Act, and strengthened our relationship with the RTIAs, providing them with co-operative marketing support. The province's (five) RTIAs plus Destination Halifax play an important role at the local level.

Marketing to specialty and niche markets was supported through partnerships with groups such as Taste of Nova Scotia and Golf Nova Scotia, and Destination Halifax to support the Meetings and Convention (MC&IT) and LGBT markets.

Taste of Nova Scotia

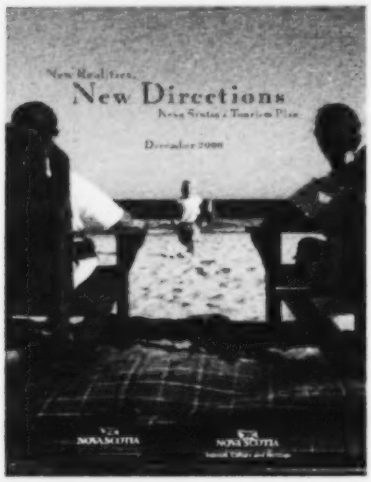
Recognizing the increasing importance on air travel, we joined the Nova Scotia Passenger Air Gateway Committee in 2007. Partners include the Halifax Stanfield International Airport, Atlantic Canada Opportunities Agency (ACOA), Nova Scotia Business Inc. (NSBI) and Destination Halifax. Markets include Chicago, Washington and London, UK. In 2008, through our work on the gateway committee, we were presenting sponsor for the Chicago Celtic Festival, and supported Air Canada's direct flight from London Heathrow to Halifax with joint advertising in the London Underground.

London Underground

Partnerships continued with the Canadian Tourism Commission (CTC), as well as the Atlantic Canada Tourism Partnership (ACTP), which includes the four provincial tourism departments and industry associations and ACOA. These partnerships have been critical in reaching the U.S. and overseas markets. We also partnered with a number of transportation carriers, such as Icelandair and Bay Ferries Ltd., and tour operators, like Collette Vacations, on joint marketing activities.

Our Multi-Year Strategy

New Realities, New Directions, our multi-year tourism strategy, confidently stepped into a new era of evolving markets and changing customer behaviours when it was introduced in 2006. It has three pillars: courtship strategy, gateway strategy and core experiences. Together, they take an approach that is flexible and adaptive to change – particularly relevant during these uncertain times.



New Realities, New Directions was introduced in 2006

Courtship – The courtship strategy is defined by three words: lure, sample, buy. The objective is to raise awareness of Nova Scotia and lure potential visitors to novascotia.com where they will sample the Nova Scotia experience and be directed to the opportunity to book their trip. As technology advances and the Internet continues to grow in importance, more emphasis is placed on e-marketing, social media and online booking.

Gateway – The gateway strategy focuses efforts on large geographical markets with direct access to Nova Scotia, either by car, ferry, rail or air. There is particular focus on targeting cities with direct air access, including Toronto, Ottawa, Montreal, Calgary, Boston, New York, Washington, Chicago, London, Reykjavik and Frankfurt. Marketing partnerships with a number of travel trade operators and transportation carriers, such as Bay Ferries Ltd. and Icelandair, maximize our efforts in these gateways.

Core experiences – This strategic pillar focuses on developing the quality experiences desired by potential visitors. Today's traveller is looking for an authentic experience. In Nova Scotia, they are looking for ways to immerse themselves in our maritime way of life. We offer traditional and modern ways of interacting with our culture. A number of core experience areas differentiate Nova Scotia while appealing to the needs of the traveller. These include seacoast, heritage, culture, outdoors, urban and cuisine.

The Nova Scotia Tourism Brand

Our brand is our promise to deliver something valued by our visitors and potential visitors. In 2007, we re-examined our brand positioning by engaging customers and industry members throughout the province and other parts of North America. The result was a re-energized brand with the following defined attributes, benefits and personality.

For Nova Scotia, our attributes include:

Old world charm
New world pulse
Shaped by the sea
The spirit of our people

Our visitor will feel the benefits of being:

Delighted
Captivated
Grounded
Fulfilled

We have defined our brand personality as:

Spirited
Affable
Salt-of-the-earth
Proud

These elements combine in our brand positioning statement:

Nova Scotia is North America's original maritime culture where visitors will be captivated by our culture of old world charm with a new world pulse, shaped by the sea and the spirit of our people.

This brand positioning will continue to guide our marketing, sales and development programs in 2009 as we seek visitors interested in exploring our natural wonders, unspoiled landscapes, historic sites and different cultures – in short, those visitors who seek an authentic experience.

Nova Scotia's Markets

Our key markets are Canada, the United States and Europe. Canadian markets, ranked from highest visitation, include the Maritime region, Ontario, Western Canada and Quebec. U.S. markets are focused in the northeastern states and Chicago. European visitation comes primarily from the United Kingdom and Germany.

People most attracted to Nova Scotia are those looking for authentic experiences – interactions with people and learning how they live and about the factors that shape their lives. This aligns with the CTC segmentation of "cultural explorer" – the active traveller who enjoys frequent weekend escapes and immerses him- or herself in nature, culture and history.

Beyond the exploration of unique and authentic cultures, our visitors have specific interests and passions that they like to pursue in their travels. The challenge is to make a connection with those whose interests are consistent with the unique experiences Nova Scotia offers. Some visitors, particularly Europeans, are more passionate about nature and outdoor experiences, while others look for more direct links to our culture.

Our North American visitors are inspired by places they read or hear about year round, but often plan their summer and fall vacation within three months of travel. Overseas travellers may begin planning their vacation almost a year in advance.

The demographics and attitudes of visitors vary by market and by their level of awareness:

The Maritime market includes the widest demographic range of visitors and the greatest percentage of families travelling with children. With a high awareness of Nova Scotia, this market is motivated by things to do, ranging from festivals and events to shopping or getaway weekends. Due to proximity, there is a greater opportunity to stimulate more frequent trips based on a particular experience.

Percentage of visitation	**54%**
Average age of visitor	**35-44 years**
Average visitor party spend	**$560**
Length of stay	**4 nights**
Avg. spend per person/day	**$60**

Outside of the local or regional market, our visitors tend to be well educated, have above-average incomes and are more likely to be in the baby boom years or older. On average, out-of-province visitors spend more per visit.

Visitors from Ontario are a combination of couples over the age of 40 and families. They have a relatively low level of awareness of the province as a destination and are interested in exploring our maritime culture. Our way of life, history, cuisine, culture and outdoor experiences are appealing.

Percentage of visitation	**20%**
Average age of visitor	**45-54 years**
Average visitor party spend	**$1,100**
Length of stay	**7.5 nights**
Avg. spend per person/day	**$69**

Visitors from the rest of Canada are more likely to be couples. The desired experiences range from immersing in our culture to outdoor activities and enjoying local cuisine.

Percentage of visitation	**8%**
Average age of visitor	**45-54 years**
Average visitor party spend	**$1,400**
Length of stay	**11.7 nights**
Avg. spend per person/day	**$61**

Visitors from the United States are primarily couples looking for experiences that lead to an understanding of our culture. They tend to be highly educated and affluent.

Percentage of visitation	**9%**
Average age of visitor	**55-64 years**
Average visitor party spend	**$1,000-1,500***
Length of stay	**6.5-8.5 nights***
Avg. spend per person/day	**$74-$86***

* NE and Other U.S. markets

Visitors from Overseas also tend to be couples. They have a low level of awareness of Nova Scotia and tend to be middle-aged and older, well educated and with higher than average incomes. These visitors are interested in outdoor and nature experiences, combined with experiencing our local lifestyle and unique culture, while enjoying our cuisine and quality accommodations.

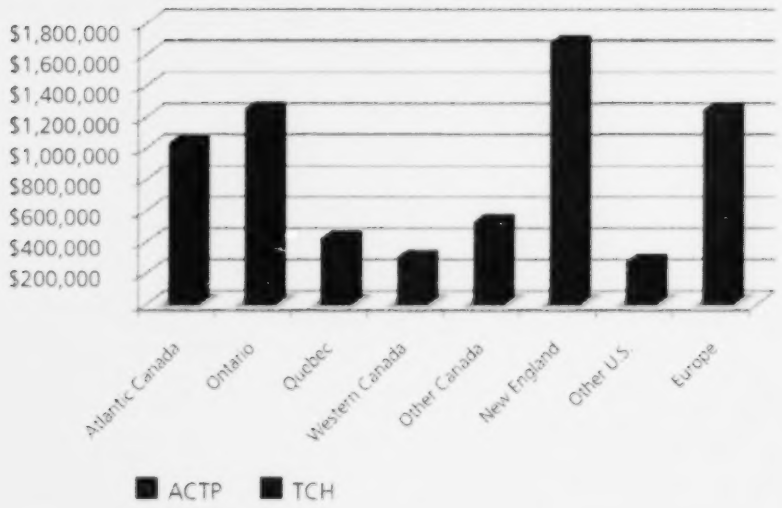
Percentage of visitation	**4%**
Average age of visitor	**35-64 years****
Average visitor party spend	**$1,300**
Length of stay	**10.8 nights**
Avg. spend per person/day	**$63**

** 35-44, 45-54 and 55-64 years of age categories were all 24% of overseas visitors

Nova Scotia's Markets

Tourism Budget and
Market Allocation

Marketing and Sales - Market Specific
Budget by Market



The Plan for 2009

The three pillars of our long-term tourism strategy, *New Realities, New Directions,* continue to guide our activities in these uncertain times. Those pillars – courtship, gateway and core experiences – are the basis for the tactics planned for the industry in 2009.

As part of the courtship strategy, we will build awareness and lure potential visitors to novascotia.com through online and traditional advertising, public relations, direct marketing, event marketing and social media. At novascotia.com, they will sample our culture and be given the opportunity to easily buy Nova Scotia experiences.

These consumer-focused efforts will be complemented by travel trade and partnership activities in key markets – part of our gateway strategy. Meanwhile, product development will focus on ensuring core experiences are of the quality desired by our target markets.

The 2009 plan will help guide our industry through a period of unpredictability and change. The highlights of this year's plan include:

- A new brand advertising campaign to lure potential visitors to our beauty and culture through the warmth and friendliness of our people.

2009 National Specialty TV

- A high-impact campaign in the Maritimes at a time when travellers are more inclined to vacation close to home. The campaign will stimulate immediate travel by highlighting the many exciting things to do. A local component will build pride in tourism and inspire residents to share Nova Scotia with their friends and relatives.

- Increased consumer marketing in the United Kingdom, our largest European market, to build on the foundation established with the travel trade in previous years.

- More use of social media to ensure Nova Scotia has a greater presence in global online travel conversations. This will include monitoring and responding to online discussions and questions, and integrating blogs, social media news releases and popular sites such as Facebook and YouTube into the traditional marketing mix.

- Greater use of events and publicity in key cities to stimulate peaks of awareness during decision-making periods. The events will include opportunities to showcase our culture through music, food, wine and history.

- An enhanced editorial program in both traditional and online media to ensure that more content is available for more media to maximize Nova Scotia's presence in key markets.

- A priority focus on developing cultural tourism experiences to meet the needs of visitors who are interested in experiencing our culture firsthand in tangible and interactive ways.

- Improvements to provincial visitor information centres that will include new brand imagery and technology upgrades. Digital flat-screen technology will be used to provide important travel-related information, promote attractions and events and encourage regional travel.

Before – Peggys Cove VIC

After – Peggys Cove VIC

- A new communications strategy to keep industry informed and facilitate ongoing dialogue. This will include a new web portal, revamped Facts Flash and regular Let's Talk: Tourism Business Forums.

All Markets

While Nova Scotia focuses activity on a number of target markets, a broad range of marketing and sales activity reaches potential visitors in all markets.

Website and online

The official tourism website, novascotia.com, is the primary platform for the sample-buy component of our courtship strategy. There, visitors can find all the information they need to plan and book a Nova Scotia vacation. In addition to referrals from traditional advertising, we use search engine optimization, social media and other tactics, such as e-newsletters and e-mail blasts, to draw visitors to the website.

In 2009, novascotia.com will be updated with a new homepage design, new and integrated content, including more online videos, easier navigation, new mapping features and enhanced listings for operators.

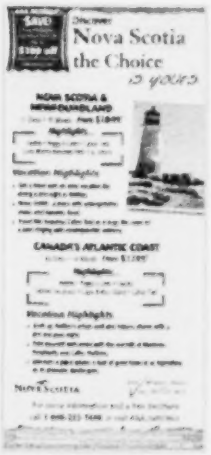
Check In, our information and reservation service, will be further integrated with novascotia.com by adding a "chat" function that will allow visitors to talk to Check In travel counsellors online. We will also add new social media features such as multi-author blogs as well as a social media newsroom. This will complement the CTC's National Asset Management Program. Nova Scotia is participating in this national marketing campaign leading up to the 2010 Vancouver Winter Olympics. The program includes a two-year shoot of high-definition footage and multimedia story packages about Nova Scotia experiences that will be distributed through print, broadcast and social media channels worldwide.

CTC's National Asset Managment Program

Travel Media and Travel Trade

Our travel media program will continue in 2009 with support, story ideas and familiarization (fam) tours for travel writers around the world. The program garners millions of dollars worth of earned media coverage with influential publications and programs in all markets.

Year round, we reach potential visitors through the travel trade, which includes tour operators, travel agents and other travel influencers. Activities include attendance at select marketplaces and trade shows, sales calls and destination training presentations to travel trade staff, client events and special promotions, and hosting fam tours for travel trade clients. We will also partner with tour operators on joint marketing agreements to promote Nova Scotia to their customers. An example of such a partnership is Collette Vacations, which promoted Nova Scotia with a print ad in AAA Magazine and an e-mail blitz to travel agents.



Partnership: Collette Vacations

To assist with these travel trade activities, we have representatives in the United Kingdom and Germany. They promote Nova Scotia and provide a valuable, consistent link to the media, tour operators and travel industry in these markets.

These broad marketing and sales efforts are complemented by additional activity in target markets.

Canada

The domestic market is relatively stable and accounts for 87 percent of all visitors to Nova Scotia in 2008.

In 2009, we will introduce a new national advertising campaign that aims to lure potential visitors to the beauty and culture of Nova Scotia through the warmth and friendliness of our people.

2009 Magazine Ad

The campaign, to reach all Canadian markets, will include five, 30-second ads on specialty TV channels such as Home and Garden Television and Bravo, print advertising in magazines such as Canadian Geographic, Zoomer and Chatelaine and in select regional newspapers as well as the Globe and Mail, and online advertising on sites such as CBC.ca and theweathernetwork.ca. It will also include an expanded direct mail program through Reader's Digest magazine, one of the world's largest direct marketing companies. Editorial, travel trade and social media activity will support the campaign.

We will also attend a number of national travel showcases, including joining with industry partners at Rendez-vous Canada, the country's premier international travel trade marketplace, in Calgary in May 2009.

The national campaign will be extended with specific activity in target markets.

Maritime Region

Visitors from other Atlantic Canadian provinces make up 54 percent of all visitors to Nova Scotia, with most coming from New Brunswick. Awareness of Nova Scotia in this important market is high, allowing the marketing to focus more on specific things to do, including our many award-winning festivals and events, arts and culture, shopping, cuisine and popular urban experiences.

In addition to the national campaign, an enhanced regional campaign will kick off in January with a calendar insert and online promotion in partnership with Saltscapes Publishing. The spring, summer and fall campaigns will include a pool of 15-second and closed-captioning ads on network TV, newspaper and online advertising, newspaper inserts, a presence at the Atlantic Motorcycle and ATV Show in Moncton in February and at the Saltscapes East Coast Expo in Halifax in April 2009.

Saltscapes East Coast Expo

The regional campaign includes opportunities for partnership and will be supported with more editorial and social media activity. It will also include a component to coincide with Tourism Awareness Week in June that will increase pride in our tourism industry, encourage local travel and inspire residents to share Nova Scotia with friends and relatives, who make up a large portion of our visitors.

Ontario

Ontario is our second-largest domestic market, accounting for about 20 percent of our visitors. In addition to the national campaign, there will be targeted activity in Toronto and Ottawa, including promotional events, direct mail, online marketing and magazine and newspaper advertising.

We will attend consumer and trade shows in this market, including Toronto's Ultimate Travel Show, the Ottawa Travel and Vacation Show, the North American International Motorcycle Show and the Ontario Motorcoach Association Annual Convention. Nova Scotia will also have a presence at the Toronto and Ottawa golf shows with Golf Nova Scotia.

With more than 80 percent of the Canadian media based in Toronto, this is an important market for travel media and editorial activity. Marketplace attendance at the CTC's Go Media (European and domestic media) and group fam tours focusing on niche products are key factors to media success in the Ontario market.

There will also be marketing-public relations promotions in both Toronto and Ottawa. These events will be similar to the 2007 Ceilidh in the Capital promotion in Ottawa and will involve partners that represent our core experiences.

Marketing-public relations promotions typically involve a series of events and activities supported by an attention-grabbing advertising campaign. These promotions will be supported by editorial and social media activity, such as blogger relations, before and after the event to increase and sustain awareness.

Western Canada

Travel from Western Canada to Nova Scotia has been growing in recent years and now accounts for eight percent of all visitors. The market includes many former residents of Nova Scotia who return and can influence friends and family to visit. Our marketing efforts in Western Canada are focused primarily on Calgary.

In addition to the national campaign, consumer marketing efforts will include a marketing-public relations promotion in Calgary that will be supported with local media, including newspaper and online advertising. We will use editorial and social media tactics, as well as travel trade activity, to increase buzz around the event.

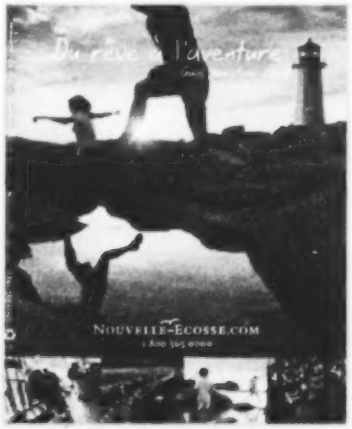
Nova Scotia will also have a presence at the Calgary Outdoor Adventure and Travel Show in March.

Quebec

The Quebec market consistently accounts for about five percent of all visitors to our province. Nova Scotia has a unique and well-developed Acadian experience that is highly appealing to this market.

The focus of our consumer marketing effort is in the Montreal area and includes specialty TV, print ads in magazines and newspapers, online ads and a French-language direct mail piece.

We produce Du rêve à l'aventure, a version of the Doers' and Dreamers' travel guide for French-language inquiries.



French Travel Guide

In August 2009, New Brunswick will host the Congrès mondial acadien (World Acadian Congress). Nova Scotia is participating in joint marketing efforts to capitalize on this event.

We also will attend Bienvenue Quebec Trade Show and Marketplace, a travel trade show in Quebec City in October 2009.

United States

Travel from the United States has been in decline and currently makes up nine percent of all visits to Nova Scotia. Key markets are in New England, with some activity in the mid-Atlantic states of New York, Pennsylvania and New Jersey, as well as the city of Chicago. We will work mainly through partnerships to advertise in these markets.

In the northeastern United States, we will continue to partner with Bay Ferries Ltd. to bring our Nova Scotia brand to major markets, including Boston and New York, with TV, newspaper and online advertising. This partnership is funded through the Atlantic Canada Tourism Partnership (ACTP).

We will also work with partners to continue to target the Chicago market through the Nova Scotia Passenger Air Gateway Committee. This partnership supports airlines such as United Airlines, which has direct flights between Chicago and Halifax. Activities include a three-year commitment as presenting sponsor at the Chicago Celtic Festival and spring and fall marketing campaigns under the brand FlyNovascotia.com. Further to the strong Celtic music connection, Nova Scotia is also planning a return to the Milwaukee Irish Festival in the summer of 2009. This is in close proximity to the Chicago gateway.

2008 Chicago Celtic Fest

Activity in the U.S. markets is supported by travel trade and travel media activity, including a presence at the American Bus Marketplace, AAA Travel Marketplace, Seatrade Miami and the National Tour Association Annual Convention.

Europe

Visitors from Europe make up about four percent of all visitors to Nova Scotia. While small in number, they typically stay longer and spend more, contributing eight percent of our total tourism revenues.

Because awareness of Nova Scotia is low and the cost to advertise is high, our main focus in these markets is on travel trade and travel media, with some consumer marketing. This is done mainly in partnership with the ACTP and CTC.

United Kingdom

The United Kingdom is Nova Scotia's largest European market. Though it accounts for less than two percent of all visitors, this market shows potential for growth. Our activity has primarily been through travel trade and travel media, with some consumer activity.

Through ACTP, Nova Scotia will take part in the CTC's consumer campaign, appearing under the Atlantic Canada brand in spring 2009. The campaign will include a newspaper supplement and micro-web site with The Times, advertising in the London Underground, online advertising and social media.

Our in-market representatives will continue to promote Nova Scotia to the travel trade, journalists and airlines through sales calls, destination training with tour operators, attendance at key consumer and trade shows and marketplaces, and other activity.

In 2009, Nova Scotia will build on previous years of travel trade and consumer activity to include more direct-to-consumer marketing, including sponsorship of a concert series in eight cities during the summer months. This will provide an opportunity to reach an audience of potential consumers that meets our visitor profile and highlight a variety of unique Nova Scotia experiences, including our music. Travel trade and travel media activity will be incorporated into the event.

We are also attending the Spotlight Canada Marketplace and World Travel Market in 2009, two travel trade shows in London, and will begin planning for an enhanced Nova Scotia presence at one of the U.K.'s largest consumer travel shows, Destinations Consumer Show, in 2010.

To support increased consumer marketing in the U.K., we are extending our toll-free long-distance service to this market.

Germany

Through ACTP, we will participate in the CTC's consumer campaign in Germany, appearing under the Atlantic Canada brand in the spring. This will include a variety of outdoor advertising in high-traffic and transit areas, and online and social media.

Our in-market representatives will continue to promote Nova Scotia to the travel trade, journalists, and airlines. Activities will include sales calls and destination training with tour operators, attendance at key trade and consumer shows, and selecting media for Fam tours.

We will also attend the International Tourism Bourse Travel Trade Show in Berlin in March 2009.

France

Through ACTP, we will be included in the CTC's consumer campaign in France. This will include a variety of outdoor advertising in transit areas, including ads in the Paris Metro, as well as online and social media.

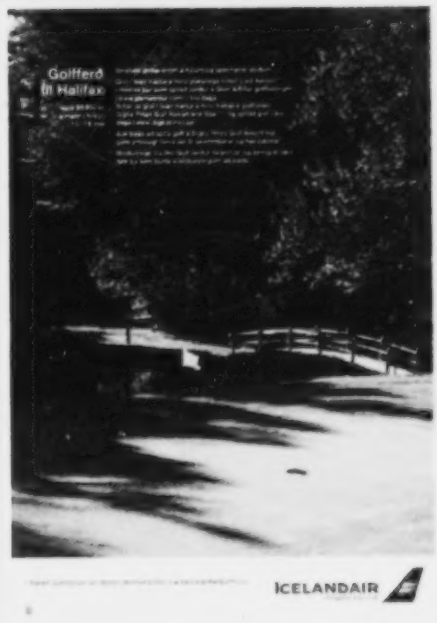
Iceland/ Japan

Iceland

The return of Icelandair in 2007 continues to provide new opportunities to leverage the airline's brand awareness and reach travel trade and consumers in Iceland and the other European markets it serves. We partner with Icelandair on a marketing campaign to promote Nova Scotia to their potential customers.

Nova Scotia will attend the Mid-Atlantic Workshop and Travel Seminar in Reykjavik in February 2009 in partnership with Destination Halifax and Nova Scotia industry partners, including sponsorship of the closing dinner.

We also participate in ongoing travel trade and travel media activity in this market.



Icelandair Ad

Japan

Nova Scotia is active in the Japanese market through ACTP. A regional sales manager helps to implement marketing activities, including travel trade and travel media fam tours, attendance at marketplaces and tradeshows, tour operators marketing partnerships, special promotions and events.

Niche Markets

Today's traveller has more choice than ever and makes vacation decisions based on specific passions and interests rather than on destination alone.

Nova Scotia marketing, sales and product development efforts focus on a number of core experience areas. These include seacoast, outdoor adventure, cuisine, music and culture, history and heritage and urban culture. Within each core experience, there are specific interests or niches that can be used as a draw for new visitors. These niches include surfers, Celtic music lovers, genealogists, foodies and wine lovers, motorcyclists, lesbian, gay, bisexual and transgender (LGBT) travellers and many more.

We support many of these niche markets through funding partnerships with a variety of organizations. We work with Taste of Nova Scotia to promote food and wine, Destination Halifax to reach the meetings and conventions and LGBT markets, Golf Nova Scotia to promote our golf experience, Destination Southwest Nova Scotia and private partners to promote motorcycling, and the Atlantic Canada Cruise Association to encourage cruise and homeporting. We also provide funding to regional tourism industry associations to support co-operative marketing initiatives.

Destination Halifax Fun Map: LGBT Ad

The rapid growth of the Internet, specialty cable channels and social media provides new ways to reach highly targeted audiences with niche products and experiences. We have begun to capitalize on this by developing rich content, including video vignettes, for novascotia.com and using search engine optimization and online advertising.

In 2009, we will increase our efforts in niche development and marketing. Our enhanced efforts in social media in 2009 will further our ability to reach out into these "long tail" markets. We will also enhance online efforts with increased editorial activities – creating and pitching unique story ideas to specialty media to reach potential visitors around the world.

Core Experiences

To remain competitive in today's market, we must remain focused on developing and enhancing Nova Scotia's tourism experiences.

Industry development

This begins with a skilled, professional and vibrant workforce. We will continue to fund the Nova Scotia Tourism Human Resource Council with the goal of addressing current and future labour market priorities and supporting new professional development opportunities in response to industry's needs. Offerings such as the Masterclass series, which will be delivered in the spring, provide executive-level workshops for industry leaders, managers and owners.

In 2009, we will continue to enhance the knowledge and expertise of the tourism industry by supporting learning opportunities such as best-practice missions on topics like living history, coastal communities and music.

We will expand our inventory of market-ready experiences to share with visitors through marketing and sales activities, and help tourism destinations develop our "best-known secrets" by providing professional advice in the area of market-readiness. A new *Guide to Working with the Travel Trade*, another in our series of useful how-to publications, will help operators better understand how to successfully do business with tour operators and travel agents.

Destination development

Through our application-driven funding programs, we will support the development of existing attractions through projects that make sites come alive for visitors. We'll encourage historical, cultural, natural and community sites to enhance visitor experiences by telling our stories through theatre, dance, music and narrative.

Building upon the Tourism Destination Area process, we will continue to work with destinations and communities to enhance their overall tourism readiness. The Destination Market-Readiness program provides communities and businesses with expertise to assess the market-readiness of their destination through mystery shop assessments, mentoring and training opportunities. We will build on the success with the Bay of Fundy and Yarmouth and Acadian shores market-readiness initiatives by offering more of these opportunities throughout the province.

Acadian Dancers

The Bay of Fundy is an area of growing international interest. In 2009, we will continue to work with partners on the Bay of Fundy Star Generator Potential Research and to provide funding and advisory services for the market-readiness initiatives of the Bay of Fundy Tourism Partnership.

Bay of Fundy Kayakers

Cultural tourism

Supporting cultural tourism is a priority for 2009. Our culture – including our founding cultures, music, cuisine, art, heritage and the natural environment – has shaped us as a people and makes Nova Scotia unique from other tourism destinations.

Through our Tourism Development Investment Program we will help Nova Scotians who want to bring their culture and heritage to life for visitors by supporting animation and living history projects that interpret our rich cultural heritage. Priority areas include Mi'kmaq, Acadian, Celtic, African-Nova Scotian, and Nova Scotian-themed theatre, music, storytelling and dance at existing sites and attractions.

DRUM! electrifing music, rhythms and dance

By building relationships and offering advice, we will enhance opportunities to showcase our traditional agricultural and fishing ways of life, as well as new ways to experience indigenous culinary and wine products. We will also continue to invest in the expansion of the new Economusee: Artisans at Work sites network.

Sustainability

Developing our authentic and uniquely Nova Scotian experiences will be key to building a sustainable tourism industry. So too will preserving and protecting our spectacular and natural assets, which are among our core tourism strengths.

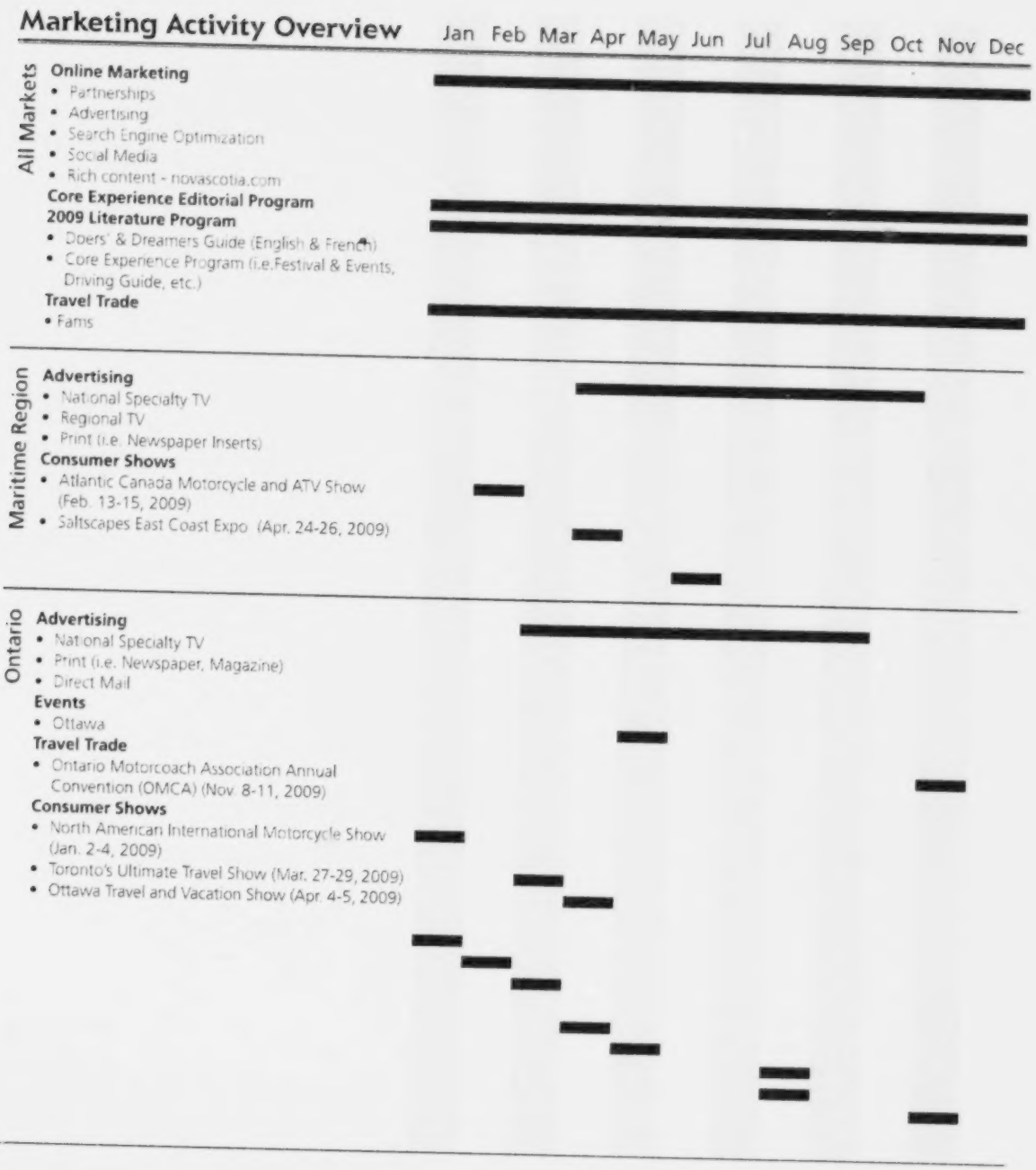
In 2009, we will continue to participate in committees and provide tourism advice on initiatives such as the Sustainable Coastal Tourism Development Strategy, the Coastal Management Framework through Provincial Oceans Network, and the management and acquisition of coastal lands.

We are committed to furthering sustainable tourism development practices by developing case studies, raising the profile through regional sustainability awards, and championing and celebrating our collective successes.

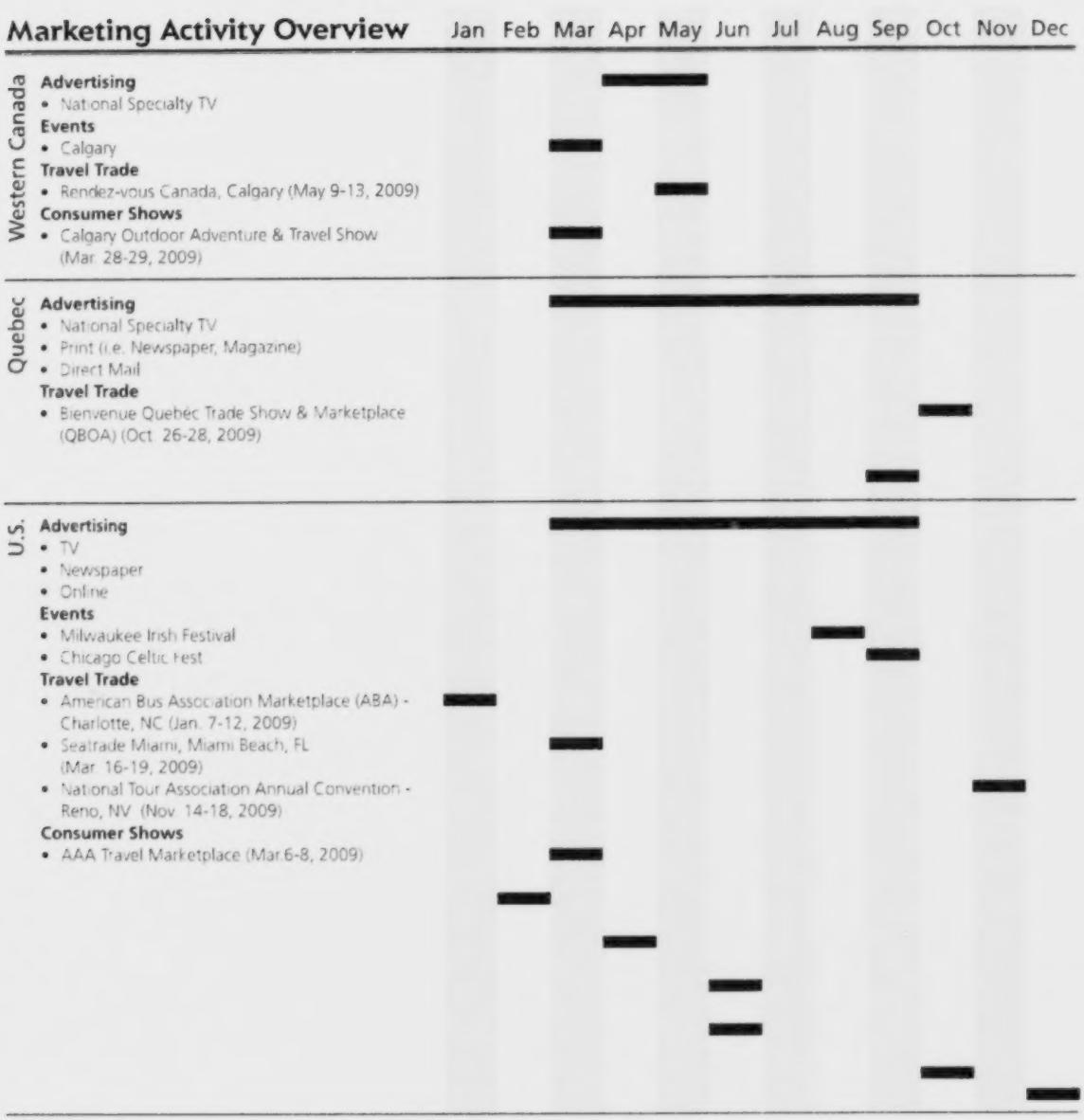
Cape Forchu, Yarmouth and Acadian Shores

Finally, we will hold a "Tourism Financial Summit" to help tourism operators understand the environment for accessing capital. The financial viability of Nova Scotia tourism businesses is key to a sustainable tourism industry. This working session will gather members in the lending community to review the health of the sector, present trends, best practices and contribute to a better understanding between lenders and the industry, as well as identify investment opportunities.

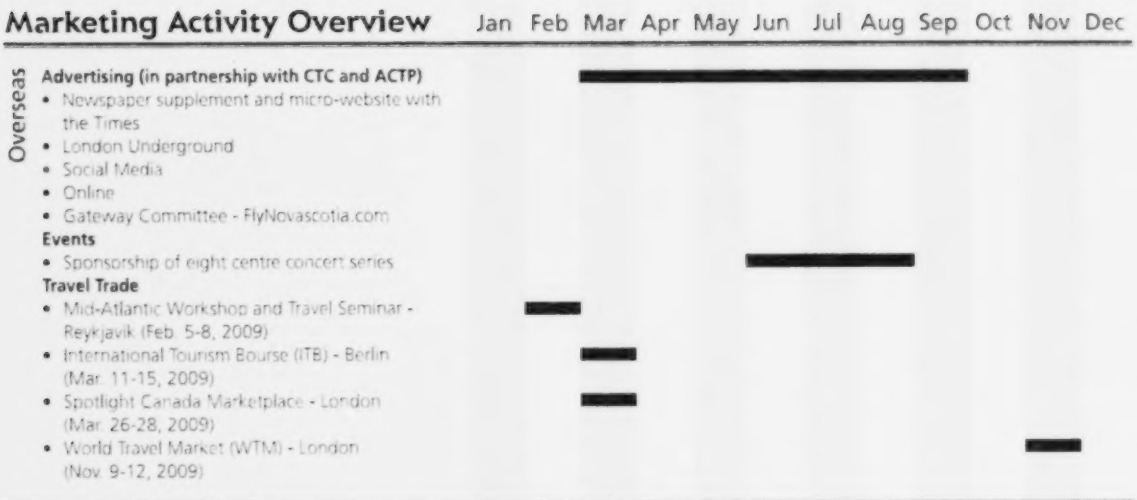
Marketing Activity Overview


Marketing Activity Overview
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
All Markets
Online Marketing
• Partnerships
• Advertising
• Search Engine Optimization
• Social Media
• Rich content - novascotia.com
Core Experience Editorial Program
2009 Literature Program
• Doers' & Dreamers Guide (English & French)
• Core Experience Program (i.e.Festival & Events, Driving Guide, etc.)
Travel Trade
• Fams
Maritime Region
Advertising
• National Specialty TV
• Regional TV
• Print (i.e. Newspaper Inserts)
Consumer Shows
• Atlantic Canada Motorcycle and ATV Show (Feb. 13-15, 2009)
• Saltscapes East Coast Expo (Apr. 24-26, 2009)
Ontario
Advertising
• National Specialty TV
• Print (i.e. Newspaper, Magazine)
• Direct Mail
Events
• Ottawa
Travel Trade
• Ontario Motorcoach Association Annual Convention (OMCA) (Nov. 8-11, 2009)
Consumer Shows
• North American International Motorcycle Show (Jan. 2-4, 2009)
• Toronto's Ultimate Travel Show (Mar. 27-29, 2009)
• Ottawa Travel and Vacation Show (Apr. 4-5, 2009)

Marketing Activity Overview


Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Western Canada
Advertising
• National Specialty TV
Events
• Calgary
Travel Trade
• Rendez-vous Canada, Calgary (May 9-13, 2009)
Consumer Shows
• Calgary Outdoor Adventure & Travel Show (Mar. 28-29, 2009)
Quebec
Advertising
• National Specialty TV
• Print (i.e. Newspaper, Magazine)
• Direct Mail
Travel Trade
• Bienvenue Quebec Trade Show & Marketplace (QBOA) (Oct. 26-28, 2009)
U.S.
Advertising
• TV
• Newspaper
• Online
Events
• Milwaukee Irish Festival
• Chicago Celtic Fest
Travel Trade
• American Bus Association Marketplace (ABA) - Charlotte, NC (Jan. 7-12, 2009)
• Seatrade Miami, Miami Beach, FL (Mar. 16-19, 2009)
• National Tour Association Annual Convention - Reno, NV (Nov. 14-18, 2009)
Consumer Shows
• AAA Travel Marketplace (Mar.6-8, 2009)

Marketing Activity Overview


Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Overseas
Advertising (in partnership with CTC and ACTP)
• Newspaper supplement and micro-website with the Times
• London Underground
• Social Media
• Online
• Gateway Committee - FlyNovascotia.com
Events
• Sponsorship of eight centre concert series
Travel Trade
• Mid-Atlantic Workshop and Travel Seminar - Reykjavik (Feb. 5-8, 2009)
• International Tourism Bourse (ITB) - Berlin (Mar. 11-15, 2009)
• Spotlight Canada Marketplace - London (Mar. 26-28, 2009)
• World Travel Market (WTM) - London (Nov. 9-12, 2009)

Research

As travellers become more sophisticated and the pace of change in the tourism industry accelerates, it is increasingly important to gain insights into customer preferences. It is also necessary to continually refine tourism measurements to evaluate our efforts and assess how Nova Scotia is performing in a highly competitive marketplace.

In 2009, the department will conduct a comprehensive visitor exit survey to enable us to update information gathered in 2004 about our visitors and their trip characteristics and to investigate emerging market segments, such as motorcyclists or new Canadians.

A wealth of research information is available through the CTC, Statistics Canada and other sources. We continually monitor this information to extract relevant insights and trends. This year, with global tourism challenges, there was heightened interest in resident travel. In 2009, we'll report on the characteristics of our resident market through information obtained from the new Travel Survey of Residents of Canada.

A new online analysis tool will help investors and proponents understand how their project impacts the economy and the Business Advantage resource will be updated with a Tourism Industry Investment Prospectus.

We will also explore new ways to track air travel capacity into the province and the region, and assess our evaluation framework to ensure we're using the most suitable measurements to support decision-making.

Finally, in 2008 we conducted a competitive analysis of Nova Scotia's tourism industry to determine our strengths and weaknesses, threats and opportunities. The information will be shared throughout the year and will facilitate important dialogue about what we need to do - together as an industry - to remain competitive.

Industry Communications

Given the number of players in Nova Scotia's diverse tourism industry and the need to work together and align efforts to ensure our resources go further, communications is critical to our overall success. We have several avenues for industry engagement and input, including stronger relationships with our RTIAs and our regular Let's Talk: Tourism Business Forums.

But we can do more to improve the exchange of information and ideas. In 2009, we will introduce new and improved communications tools, including an industry web portal, a revamped Facts Flash, enhanced tourism business forums and other industry resources.

Let's Talk Tourism Spring 2008

Conclusion

Conclusion

Our plan is solid, but flexible. In response to today's realities, we are shifting resources to address opportunities – more investment in the regional campaign – while building for continued growth in the United Kingdom. At the same time, the plan allows us to make adjustments for the short and long term as new challenges and opportunities arise.

When we launched our strategy *New Realities, New Directions* in 2006, it was to acknowledge an evolving tourism market. That has not changed – both the consumer and the competitive environment are moving targets. Marketing continues to be important in responding to the changes.

However, we also need to turn our attention to working together to develop a sustainable tourism industry, one that includes developing and packaging experiences that are unique, authentic and driven by the demands of the market.

Nova Scotia has many strengths, and its people are perhaps the greatest. As the global economic instability moves into 2009, we will rely on our entrepreneurial spirit to continue building our sector even in uncertain times. The tourism industry can be strong and resilient if we work together to solve problems and work toward common goals.